C9550-3-4

A SURVEY OF ANIMAL HEALTH PRODUCTS AND FEED
Among Readers Of

Farm Supplier

- Feed Tonnage Sold, By Category
- Feed Preparation By Dealers
- Manufacturers Who Supply Feed To Dealers
- Animal Health Products Sold:
  By Type; By "Packaged" vs Feed Additive;
  By Brand Or Manufacturer;
  Best-Selling Brands
- Extent Of Farmer Trading Area
- Other Information

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NOTE: The survey questionnaire at the back of this report can serve as a table of contents since the **question numbers** MATCH the numbers of the corresponding **answers** on pages 5 through 27.

Highlights are on pages 3 and 4.

IMPORTANT RESTRICTIONS

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FARM SUPPLIER ANIMAL HEALTH PRODUCTS AND FEED SURVEY

Purpose of Survey

The purpose of this 1987 survey of the FARM SUPPLIER audience was (1) to update much of the animal health and feed information collected in 1980, and (2) to answer new questions.

SURVEY METHOD

Sample Design: Every nth name was computer-drawn from the May 1987 FARM SUPPLIER BPA qualified circulation list of U.S. farm supply retail dealers to cover this list and provide some 1,000 names. The list was arranged in zip code sequence during the nth name extraction.

Sample Size:

Number in mailing sample...	1,000
Number of usable returns...	436
Number of unusable returns.	25
Number of returns.....	461
Percent response.....	46.1%

Questionnaire Design: The questionnaire - at the back of this report - was designed to obtain the information felt most needed by the FARM SUPPLIER staff. The order, arrangement, and wording of the questions were guided by generally accepted mail survey technique.

Mailing Procedure: Computer-printed control cards containing the survey sample names and other information were numbered consecutively. Each questionnaire mailed was also numbered to match the number assigned the recipient on the control card.

The first mailing went out on May 27 1987. On June 3rd a postal card reminder was sent to each non-respondent.

A follow-up questionnaire was mailed on June 19th to all non-respondents. On July 1st a second postal card reminder went out to all non-respondents.

A third questionnaire (second follow-up) identical to those in the earlier mailings went out to second mailing non-respondents on July 15th.

Tabulation and Report Writing: The survey returns were tabulated by Analytical Computer Service Inc., Chicago. The Watt Publishing Company Research Section wrote this report.

FARM SUPPLIER ANIMAL HEALTH PRODUCTS AND FEED SURVEY

HIGHLIGHTS

1. 64% of Farm Supplier U.S. retail dealers reported that they sold feed to farmers in 1986. In terms of form of feed, 94% of feed dealers sold an average of 1,455 tons of complete feed in 1986; 78% sold an annual average of 900 tons of feed supplement and/or concentrate; 44% sold an average of 100 tons of base mix or superconcentrate; and 42% averaged 80 tons of feed premix. (pages 5-7)

2. Most of the 1986 feed dollar sales of dealers came from feed they provided by (1) blending supplement with grain - about 26% of feed dollar revenue; (2) buying complete feed and reselling it as is - 24% of feed dollars; (3) manufacturing feed from a premix - 20% of feed sales; and (4) manufacturing feed from the ground up - 17%. (page 8)

3. Of the 34% of feed dealers who bought one or more of 12 types of feed-making equipment in the last five years, the largest percent 55% - bought bulk feed truck bodies, followed by bulk feed bins - bought by 34%, bagging equipment - 23%, roller mills and screw conveyors - 19% each, and grain storage bins - 17%. (page 10)

4. Of the 57% of dealers who sold animal health products, 96% sold "packaged" health products for livestock. Out of 22 listed product classes, the one sold by the largest percent (90%) of these dealers was milk replacer, followed by wormers for cattle (86%), wormers for swine (84%), scours treatment for calves (83%), and antibiotics for swine (82%). (page 13)

(MORE)

5. In answer to the question "Do you stock and sell HORSE health care products?" 71% of the animal health product dealers answered "Yes" - up from 64% earlier reported for 1980. The most widely-sold product was wormers, followed, in order, by fly control products, vitamin-mineral conditioners, hoof dressings, liniments, shampoo, and antiseptic ointments - all sold by well-over half of these dealers. The two products with the largest dollar volume were wormers reported by 84% of the dealers, and fly control products cited by 62% - up from 53% in 1980. (pages 23-24)

6. The customer requests the dealer's opinion or recommendation in an average of 55% of "packaged" animal health product purchases, and 50% of feed additive health product purchases. (page 25)

7. Regarding the animal health product dealers' peak season for ORDERING their purchases of antibiotics and growth promoters, the largest percent - 33% - said there was no seasonal variation; the next largest percent - 27% - said Fall; for wormers, the largest percent - 37% - said Spring which was also the peak season for ordering livestock insecticides and miticides, cited by 42%. Regarding what season is normally best for SALES of antibiotics and growth promoters, the largest percent - 31% - said Spring which was also the best season for selling wormers; for selling livestock insecticides and miticides the highest percent - 39% - said Summer. (page 25)

8. The farm supply dealer's farmer trading area extends an average of 37 miles radius from his establishment. (page 27)

FEED SUPPLIER ANIMAL HEALTH PRODUCTS AND FEED SURVEY

DETAILED FINDINGS

1. "Do you sell feed to farmers?"

Percent of (433 reporting) dealers* answering "Yes"..... 64%

(a) Types Of Feed Sold To Farmers

	Among Dealers Who Sell Feed, Percent Reporting
Respondents..	271
Beef cattle feed	90%
Dairy cattle feed	74%
Milk replacer (veal calf supplement)	78%
Swine feed	91%
Layer, breeder, or replacement feed	80%
Broiler feed	54%
Turkey feed	42%
Sheep feed	60%
Horse feed	85%
Fish feed	52%
Rabbit feed	83%
Dog food	94%
Cat food	88%
Other	13%

2. "In what form(s) do you sell feed?"

	Percent of Feed Dealers Reporting
Respondents..	265
Complete feed	94%
Feed supplement or concentrate (contains everything except grain and/or roughage)	78%
Base mix or superconcentrate (contains everything except primary protein, grain, and roughage)	44%
Feed premix (uniform mixture of microingredients generally added to feed at rates of up to 100 lbs. per ton of finished feed)	42%
Other	9%

*"Dealers" refers to the approximately 38,080 U.S. retail dealers on the Farm Supplier BPA qualified circulation list of May 4th 1987.

2. (cont.)

(a) "About how many TONS of each did you sell in 1986?"

Complete Feed

	Among Dealers Who Sold Complete Feed, Percent Reporting
Respondents..	176
2,000 or more tons....	21%
500 - 1,999 tons.....	27%
100 - 499 tons.....	33%
1 - 99 tons.....	19%
Average* tons sold per dealer.....	1,455 tons
Median tons sold per dealer.....	400 tons

*Arithmetic average.

Feed Supplement and/or Concentrate

	Among Dealers Who Sold Feed Supplement and/or Concentrate, Percent Reporting
Respondents..	150
2,000 or more tons....	17%
500 - 1,999 tons.....	34%
100 - 499 tons.....	27%
1 - 99 tons.....	22%
Average tons sold per dealer.....	900 tons
Median tons sold per dealer.....	500 tons

Base Mix and/or Superconcentrate

	Among Dealers Who Sold Base Mix and/or Superconcentrate, Percent Reporting
Respondents..	70
200 or more tons.....	15%
100 - 199 tons.....	16%
20 - 99 tons.....	36%
10 - 19 tons.....	13%
1 - 9 tons.....	20%
Average tons sold per dealer.....	100 tons
Median tons sold per dealer.....	40 tons

2. (cont.)

Feed Premix

	Among Dealers Who Sold Feed Premix, Percent Reporting
Respondents..	68
200 or more tons.....	13%
50 - 199 tons.....	29%
10 - 49 tons.....	27%
1 - 9 tons.....	31%
Average tons sold per dealer.....	80 tons
Median tons sold per dealer.....	30 tons

Other

	Among Dealers Who Sold Other Forms of Feed, Percent Reporting
Respondents..	18*
200 or more tons.....	22%
50 - 199 tons.....	28%
20 - 49 tons.....	28%
1 - 19 tons.....	22%
Average tons sold per dealer.....	220 tons
Median tons sold per dealer.....	50 tons

*Percentages and averages of this base should be viewed with more than usual caution.

(b) "What was the approximate DOLLAR volume of your TOTAL 1986 feed sales?"

	Percent of Feed Dealers Reporting
Respondents..	157
$1,000,000 or more.....	25%
$400,000 - $999,999.....	21%
$100,000 - $399,999.....	29%
$1 - $99,999.....	25%
Average feed sales per feed dealer.....	$700,000
Median feed sales per feed dealer.....	$300,000

3. "How do you obtain the feed that you sell?"

	Percent of Feed Dealers Reporting
Respondents..	262
Blend supplement/concentrate with grain.....	40%
Blend base mix with grain and soybean meal.....	25%
Manufacture feed from a premix.....	22%
Manufacture feed from the ground up.....	24%
(Any of preceding 3 items).....	(40%)
Buy complete feed and re-sell it as is.....	84%
Buy premix and re-sell it as is.....	39%
Buy base mix/superconcentrate and re-sell it as is..	32%
Other.....	10%

(a) "About what percent of your 1986 feed dollar volume came from feed you provided . . .

	Weighted Percent of 1986 Feed Dollar Volume
Respondents..	116
by blending supplement with grain.....	26%
by blending base mix with grain and soybean meal.....	6%
by manufacturing feed from a premix.....	20%
by manufacturing feed from the ground up..	17%
by buying complete feed and re-selling it as is.....	24%
by buying premix and re-selling it as is..	1%
by buying base mix/superconcentrate and re-selling it as is.....	5%
in any other way.....	1%
	100%

4. "Do you stock and sell liquid feed supplements?"

Percent of (258 reporting) feed dealers who answered "Yes"..... 23%

(a) "If 'yes,' about how many tons of liquid feed supplements did you sell in 1986?"

	Among Dealers Who Sell Liquid Feed Supplements, Percent Reporting
Respondents..	54
500 or more tons.....	7%
200 - 499 tons.....	28%
100 - 199 tons.....	19%
50 - 99 tons.....	20%
1 - 49 tons.....	26%

Average liquid feed supplement tonnage sold per seller..... 181 tons

Median liquid feed supplement tonnage sold per seller..... 100 tons

5. TYPES OF FEED EQUIPMENT USED IN DEALERS' BUSINESS

	Percent of Feed Dealers Reporting
Respondents..	242
Hammermill	48%
Horizontal mixer	24%
Vertical mixer	36%
Pellet mill	8%
Roller mill	29%
Grain storage bins	53%
Bagging equipment	34%
Bulk feed bins	57%
Bulk feed truck bodies	57%
Bucket elevator	47%
Screw conveyor (exclude augers on vehicles)	38%
Drag flight conveyor	14%
Other	5%

(a) Percent of feed dealers who bought any of the feed equipment listed in item 5 in the last five years..... 34%

(1) Type(s) Of Feed Equipment Bought In The Last Five Years

	Among Feed Dealers Who Bought Feed Equipment In The Last Five Years, Percent Reporting
Respondents..	83
Hammermill	10%
Horizontal mixer	11%
Vertical mixer	6%
Pellet mill	4%
Roller mill	19%
Grain storage bins	17%
Bagging equipment	23%
Bulk feed bins	34%
Bulk feed truck bodies	55%
Bucket elevator	14%
Screw conveyor (exclude augers on vehicles)	19%
Drag flight conveyor	10%
Other	5%

(b) "Do you STOCK and SELL feed bins and/or tanks?"

Percent of (243 reporting) feed dealers who answered "Yes"... 26%

6. FEED MANUFACTURERS WHOSE FEED DEALERS HANDLE

	Percent of Feed Dealers Reporting
Respondents..	257
ADM	5%
Agway	4%
Cenex	5%
Conagra	1%
Doboy (Domain Industries)	2%
Farmland	11%
FS	3%
Golden Sun	4%
Hubbard Milling	7%
Kent	4%
Land O'Lakes	14%
Manna Pro (Carnation)	25%
Master Mix (Central Soya)	6%
Nutrena (Cargill)	12%
Purina Mills	25%
Southern States	2%
Supersweet (International Multifoods)	3%
United Feeds	1%
United Suppliers	1%
Vigortone	2%
Walnut Grove	*
Wayne Div. of Continental Grain	12%
Other (written-in):	
Acco	2%
Blue Seal	1%
Buckeye	1%
Country Mark	1%
Crescent	1%
Gold Kist	1%
GTA	1%
MFA Feeds	1%
Protein Blender	1%
Tindle	1%
Van Den Bosch Co	1%
Zip Feed	1%
Miscellaneous (mentioned once each)	20%

*Less than 0.5%.

7. "Do you stock and sell silage PRESERVATIVES or INOCULANTS?"

Percent of (395 reporting) dealers who answered "Yes"..... 27%

(a) "If 'yes,' about how much of them did you sell in 1986?"

	Among Dealers Who Sell Silage Preservatives or Inoculants, Percent Reporting
Respondents..	72
$10,000 or more.....	13%
$2,000 - $9,999.....	36%
$1,000 - $1,999.....	25%
$1 - $999.....	26%
Average sales per seller.....	$4,360
Median sales per seller.....	$1,800

8. "Do you stock and sell any ANIMAL HEALTH PRODUCTS - either as feed additives, or as "packaged" health products sold in forms such as injectable, soluble, bolus, tablet etc.?"

Percent of (400 reporting) dealers who answered "Yes"..... 57%

(a) "If 'yes,' which of the following do you sell?"

	Percent of Animal Health Product Dealers Reporting
Respondents..	225
"Packaged" health products for LIVESTOCK.....	96%
Feed additive health products for livestock.	73%
"Packaged" health products for POULTRY.....	53%
Feed additive health products for poultry...	30%
(Any "packaged" health products).....	(98%)
(Any feed additive health products).....	(74%)

9. TYPES OF LIVESTOCK (NON-POULTRY) HEALTH PRODUCTS DEALERS STOCK AND SELL

	Among Dealers Who Stock and Sell "PACKAGED" Health Products For Livestock, Percent Reporting	Among Dealers Who Stock and Sell Health Products Sold As FEED ADDITIVES For Livestock, Percent Reporting
Respondents..	221	126
Antibiotics for:		
Beef cattle	80%	70%
Dairy cattle	68%	56%
Swine	82%	78%
(Any of preceding 3 items)	(89%)	(84%)
Anticoccidal agent	28%	21%
Bloat preventive	51%	19%
Electolytes	65%	
Grub control product	59%	10%
Iron products	64%	24%
Insecticides/miticides	80%	23%
Insecticide-treated eartags	67%	
Mastitis treatment	62%	
Microbial/fermentation product	18%	13%
Milk replacer	90%	
Nitrofurans	24%	9%
Ointment or salve	64%	
Scours treatment for:		
Swine	76%	42%
Calves	83%	38%
(Either or both of preceding 2 items)	(91%)	(44%)
Sulfa drugs	68%	32%
Vaccines and/or other biologicals for:		
Cattle	65%	
Swine	57%	
(Either or both of preceding 2 items)	(67%)	
Vitamin/mineral premixes		59%
Wormers for:		
Cattle	86%	62%
Swine	84%	56%
(Either or both of preceding 2 items)	(91%)	(65%)
Other types	3%	1%

9. (cont.)

Percent of (238 reporting) animal health product dealers who stock and sell packaged and/or feed additive . . .

livestock antibiotics..... 89%
livestock grub controls... 59%
livestock wormers..... 91%

10. TYPES OF POULTRY HEALTH PRODUCTS DEALERS STOCK AND SELL

	Among Dealers Who Stock and Sell "PACKAGED" Health Products For Poultry, Percent Reporting	Among Dealers Who Stock and Sell Health Products Sold As FEED ADDITIVES For Poultry, Percent Reporting
Respondents..	136	43
Antibiotics.....	83%	81%
Vaccines/biologicals..	18%	
Wormers.....	71%	53%
Other.....	11%	21%

Percent of (152 reporting) animal health product dealers who stock and sell packaged and/or feed additive . . .

poultry antibiotics..... 56%
poultry wormers..... 48%

Percent of (237 reporting) animal health product dealers who stock and sell packaged livestock and/or poultry vaccines..... 67%

Percent of (241 reporting) animal health product dealers who stock and sell packaged and/or feed additive . . .

livestock and/or poultry antibiotics.. 90%
livestock and/or poultry wormers..... 93%

11. BRANDS OF CATTLE WORMERS DEALERS STOCK AND SELL

Percent of (238 reporting) health product dealers who sell cattle wormers..... 87%

	Among Dealers Who Stock and Sell Cattle Wormers, Percent Reporting
Respondents..	214
Baymix.....	29%
Ivomec.....	50%
Levasole.....	28%
Rumatel.....	28%
Safe-Guard.....	36%
TBZ.....	81%
Tramisol.....	74%
Other.....	4%

(a) Largest Selling (dollar volume) Cattle Wormer

	Among Dealers Who Stock and Sell Cattle Wormers, Percent Reporting
Respondents..	110
Baymix.....	6%
Ivomec.....	18%
Levasole.....	3%
Rumatel.....	14%
Safe-Guard.....	3%
TBZ.....	31%
Tramisol.....	22%
Other.....	3%

12. "In what FORM(S) are the cattle wormers that you sell, if any?"

	Among Dealers Who Sell Cattle Wormers, Percent Reporting
Respondents..	212
Bolus.....	59%
Drench/liquid.....	25%
Feed additive.....	73%
Paste.....	54%
Soluble powder.....	23%
Other (written-in):	
Injectable.....	12%
Cubes.....	2%
Miscellaneous (mentioned once each)..	2%
Other (not specified).....	2%

13. "Do you stock and sell cattle implants?"

Percent of (222 reporting) animal health product dealers answering "Yes"..... 43%

(a) "If 'yes,' which brand(s)?"

	Among Dealers Who Stock and Sell Cattle Implants, Percent Reporting
Respondents..	94
Compudose.....	28%
Ralgro.....	94%
Steer-oid.....	6%
Synovex.....	22%
Other.....	1%

14. BRANDS OF HOG WORMERS DEALERS STOCK AND SELL

	Among Dealers Who Stock and Sell Hog Wormers, Percent Reporting
Respondents..	208
Atgard-V.....	71%
Banminth.....	38%
Hygromix.....	3%
Ivomec.....	40%
Mecadox.....	31%
Levasole.....	18%
Pig Worner-17.....	16%
Safe-Guard.....	27%
TBZ.....	35%
Tramisol.....	71%
Wazine.....	3%
Other.....	9%

14. (cont.)

(a) Largest Selling (dollar volume) Hog Wormer

	Among Dealers Who Stock and Sell Hog Wormers, Percent Reporting
Respondents..	138
Atgard-V.....	31%
Banminth.....	8%
Hygromix.....	-
Ivomec.....	13%
Mecadox.....	3%
Levasole.....	2%
Pig Wormer-17.....	4%
Safe-Guard.....	8%
TBZ.....	4%
Tramisol.....	21%
Wazine.....	2%
Other.....	4%

(b) "In what form(s) do you sell hog wormers, if any?"

	Among Dealers Who Sell Hog Wormers, Percent Reporting
Respondents..	200
Bolus.....	11%
Drench/liquid.....	32%
Feed additive.....	78%
Paste.....	10%
Soluble powder.....	47%
Other.....	13%

15. "Do you stock and sell any rodenticides?"

Percent of (224 reporting) animal health product dealers who stock and sell rodenticides..... 96%

15. (cont.)

(a) "If 'yes,' which rodenticide brand(s)?"

	Among Dealers Who Stock and Sell Rodenticides, Percent Reporting
Respondents..	213
Assault	19%
D-Con	52%
Havoc	54%
Just One Bite	24%
Ramik	28%
Rampage	19%
Ropax	23%
Vengeance	1%
Other (written-in):	
Bar Bait, Salsbury Bar Bait	8%
Trax, Trax M, Trax One	5%
Purina Rat Control, Purina Rat-A-Rest	4%
Blue Death (Master-Mix)	2%
Eagle 7	2%
Lystads	1%
Maki	1%
MFA Rat & Mouse	1%
Wayne Rat Patrol	1%
Boot Hill	1%
Enforcer	1%
Rokill	1%
Warf	1%
Miscellaneous (mentioned once each)	9%

(b) Largest Selling (dollar volume) Rodenticides

	Among Dealers Who Stock and Sell Rodenticides, Percent Reporting
Respondents..	126
Assault	8%
D-Con	8%
Havoc	19%
Just One Bite	13%
Ramik	7%
Rampage	4%
Ropax	11%
Vengeance	-
Other (written-in):	
Bar Bait, Salsbury Bar Bait	5%
Purina Rat Control, Purina Rat-A-Rest	5%
Trax M, Trax One	4%
Blue Death (Master-Mix)	3%
Boot Hill	2%
Wayne Rat Patrol	2%
Miscellaneous (mentioned once each)	9%

16. ANIMAL HEALTH COMPANIES WHOSE BRANDS OF ANTIBIOTICS, ANTIBACTERIALS AND/OR GROWTH PROMOTANTS DEALERS STOCK AND SELL FOR INCLUSION IN FEED

	Among Dealers Who Stock and Sell Antibiotics, Antibacterials and/or Growth Promotants For Inclusion In Feed, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	166	121	148	81	71
Agri-Bio (A.H. Robbins)....	2%	1%	3%	1%	1%
A. L. Laboratories.....	5%	3%	9%	4%	4%
American Cyanamid.....	47%	39%	52%	16%	15%
Borden.....	1%	1%	1%	-	6%
Cutter (Mobay).....	18%	12%	7%	5%	37%
Elanco Products.....	39%	23%	46%	10%	7%
Hess & Clark.....	17%	17%	22%	19%	10%
Hoechst-Roussel.....	5%	2%	7%	4%	1%
I.M.C.....	4%	2%	3%	1%	1%
MSD Agvet (Merck).....	17%	12%	14%	4%	4%
Pfizer.....	43%	47%	50%	37%	37%
Rhone-Poulenc.....	2%	2%	5%	2%	-
Roche Chemical Div. (Hoffmann-La Roche).....	6%	4%	6%	5%	1%
Salsbury Laboratories (Solvay).....	14%	14%	28%	31%	4%
SDS Biotech.....	1%	1%	5%	1%	-
SmithKline.....	8%	5%	14%	6%	4%
TUCO.....	20%	26%	28%	10%	8%
Other.....	7%	7%	7%	5%	6%

16. (cont.)

(a) Largest Selling (dollar volume) Antibiotics For Preventive Care

	Among Dealers Who Sell Antibiotics For Inclusion In Feed, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	38	30	41	13*	7**
Agri-Bio (A.H. Robbins)....	3%	-	-	7%	-
A. L. Laboratories.....	3%	3%	5%	-	-
American Cyanamid.....	43%	38%	39%	21%	43%
Borden.....	-	-	-	-	-
Cutter (Mobay).....	5%	3%	-	-	-
Elanco Products.....	11%	-	26%	-	-
Hess & Clark.....	-	-	2%	7%	-
Hoechst-Roussel.....	-	-	-	-	-
I.M.C.....	-	-	-	-	-
MSD Agvet (Merck).....	-	3%	-	-	-
Pfizer.....	22%	25%	11%	22%	29%
Rhone-Poulenc.....	-	-	-	-	-
Roche Chemical Div. (Hoffmann-La Roche).....	-	-	-	-	-
Salsbury Laboratories (Solvay).....	-	3%	11%	36%	-
SDS Biotech.....	-	-	-	-	-
SmithKline.....	-	-	2%	-	-
TUCO.....	5%	11%	-	-	14%
Other.....	8%	14%	4%	7%	14%

*Percentages of this base should be viewed with more than usual caution.

**Percentages of this base are not projectable.

17. ANIMAL HEALTH COMPANIES WHOSE BRANDS OF ANTIBIOTICS DEALERS STOCK AND SELL IN INJECTABLE, SOLUBLE OR BOLUS FORM

	Among Dealers Who Stock and Sell Antibiotics In Injectable, Soluble or Bolus Form, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	147	106	126	61	63
Affiliated Laboratories.....	11%	11%	8%	-	-
Agripharm (Essar).....	2%	2%	-	-	2%
American Cyanamid.....	37%	30%	34%	18%	14%
Anchor Div., (Boehringer Ingelheim).....	33%	28%	29%	15%	22%
Bristol Ag Products.....	1%	6%	-	2%	-
Ceva Laboratories.....	5%	5%	9%	5%	2%
Cutter (Mobay).....	25%	18%	12%	10%	40%
Elanco Products.....	40%	31%	44%	15%	8%
Farnam.....	14%	13%	8%	20%	56%
Franklin.....	7%	4%	1%	2%	5%
Grand Laboratories.....	-	-	3%	-	-
Hess & Clark.....	13%	13%	14%	11%	6%
Hoechst-Roussel.....	4%	3%	4%	2%	-
MSD Agvet (Merck).....	12%	12%	15%	5%	8%
Pfizer.....	61%	61%	60%	56%	56%
Pitman-Moore.....	5%	4%	3%	2%	2%
Roche Chemical Div. (Hoffmann-La Roche).....	7%	5%	2%	-	2%
Salsbury Laboratories (Solvay).....	17%	13%	29%	26%	5%
SDS Biotech.....	1%	2%	5%	2%	2%
SmithKline.....	2%	3%	4%	2%	2%
Syntex.....	2%	1%	2%	-	2%
TUCO.....	18%	32%	27%	10%	10%
Other.....	5%	7%	6%	3%	6%

17. (cont.)

(a) Largest Selling (dollar volume) Antibiotics For Disease Treatment

	Among Dealers Who Stock and Sell Antibiotics In Injectable, Soluble or Bolus Form, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	59	40	49	25	21
Affiliated Laboratories...	3%	-	2%	-	-
Agripharm (Essar).....	2%	-	-	-	-
American Cyanamid.....	14%	10%	14%	8%	-
Anchor Div., (Boehringer Ingelheim).....	11%	7%	8%	4%	5%
Bristol Ag Products.....	-	-	-	-	-
Ceva Laboratories.....	3%	3%	-	-	-
Cutter (Mobay).....	3%	3%	2%	-	14%
Elanco Products.....	8%	3%	8%	4%	-
Farnam.....	2%	-	2%	4%	19%
Franklin.....	-	-	-	-	-
Grand Laboratories.....	-	-	-	-	-
Hess & Clark.....	2%	5%	-	-	-
Hoechst-Roussel.....	-	-	-	-	-
MSD Agvet (Merck).....	3%	-	2%	-	-
Pfizer.....	35%	40%	32%	56%	52%
Pitman-Moore.....	-	-	-	4%	-
Roche Chemical Div. (Hoffmann-La Roche).....	-	-	-	-	-
Salsbury Laboratories (Solvay).....	3%	5%	16%	12%	-
SDS Biotech.....	-	-	-	-	-
SmithKline.....	-	-	-	-	-
Syntex.....	-	-	-	-	-
TUCO.....	3%	12%	4%	-	-
Other.....	8%	12%	10%	8%	10%

18. "Do you file any FD-1800s or FD-1900s with the FDA for mixing drugs into feeds?"

Percent of (204 reporting) animal health product dealers answering "Yes"..... 15%

19. "In which of the following FORMS do you stock and sell antibiotics, if any?"

	Among Dealers Who Stock and Sell Antibiotics, Percent Reporting
Respondents..	186
INCLUDED in feed we sell to farmer...	66%
Packaged for ON-FARM adding to feed..	64%
Soluble antibiotic(s) for on-farm adding to WATER.....	70%
Other.....	8%

20. "Do you stock and sell HORSE health care products?"

Percent of (221 reporting) animal health product dealers answering "Yes"..... 71%

(a) "If 'Yes,' which horse health care products?"

	Among Dealers Who Stock and Sell Horse Health Care Products, Percent Reporting
Respondents..	157
Wormers.....	95%
Shampoo.....	66%
Vitamin-mineral conditioner(s).....	70%
Hoof dressing(s).....	67%
Liniment(s).....	67%
Antiseptic ointment(s).....	59%
Fly control products.....	94%
Other.....	8%

20. (cont.)

(b) Largest Selling (dollar volume) Horse Health Care Items (Among The Top Two)

	Among Dealers Who Stock and Sell Horse Health Care Products, Percent Reporting
Respondents..	93
Wormers	84%
Shampoo	1%
Vitamin-mineral conditioner(s)	17%
Hoof ~~dressing~~(s)	1%
Liniment(s)	4%
Antiseptic ointment(s)	4%
Fly control products	62%
Other	1%

(c) "If you stock and sell any horse wormers, which brand(s) do you sell?"

	Among Dealers Who Stock and Sell Horse Wormers, Percent Reporting
Respondents..	140
Anthelcide	-
Anthon	1%
Banminth-P Paste	7%
Benzelmin	-
Camvet	1%
Dizan	1%
Eqvalan	16%
Equi-Verm	3%
Equizole	6%
Negabot	46%
Pamoban	-
Panacur Granules 22.3%	1%
Parvex bolus	1%
Piperazine Adipate	10%
Pip-Pop 320	-
Purina	16%
Shell	14%
Strongid	16%
Synanthic	1%
Tiox	-
Zimectrin	78%
Other	14%

21. "In roughly what percent of animal health product purchases do your customers ask for your (or one of your salesperson's) opinion or recommendation before making the purchase?"

In an average of 55% of "PACKAGED" health product purchases the customer requests the dealer's opinion or recommendation. (167 respondents)

In an average of 50% of feed ADDITIVE health product purchases the customer requests the dealer's opinion or recommendation. (130 respondents)

22. "What is the peak season for ORDERING YOUR purchases of animal health products?"

	Percent of Animal Health Product Dealers Reporting For . . .		
	Antibiotics, Growth Promoters	Wormers	Livestock Insecticides, Miticides
Respondents..	191	179	167
Spring.....	25%	37%	42%
Summer.....	3%	4%	20%
Fall.....	27%	27%	11%
Winter.....	12%	5%	10%
No seasonal variation...	33%	27%	17%
Other.....	-	-	-

(a) "What season is normally best for your SALES of animal health products?"

	Percent of Animal Health Product Dealers Reporting For . . .		
	Antibiotics, Growth Promoters	Wormers	Livestock Insecticides, Miticides
Respondents..	193	187	174
Spring.....	31%	36%	32%
Summer.....	6%	9%	39%
Fall.....	18%	25%	8%
Winter.....	18%	6%	4%
No seasonal variation...	27%	24%	17%
Other.....	-	-	-

23. "How many full-time workers including the active proprietor(s) does your establishment have now?"

	Percent of Dealers Reporting
Respondents.. 340	
Ten or more workers.....	22%
Five to nine workers.....	27%
Three or four workers.....	30%
One or two workers.....	21%
Average number of workers.....	8
Median number of workers.....	4

(a) "Do you now have any full-time OUTSIDE salespeople for on-farm selling?"

Percent of (349 reporting) dealers who answered "Yes"... 34%

(1) "If 'yes,' how many?"

	Among Dealers Who Have Full-Time Outside Salespeople, Percent Reporting
Respondents.. 116	
Five or more outside salespeople..	6%
Three or four outside salespeople.	9%
Two outside salespeople.....	20%
One outside salesperson.....	65%
Average number of outside salespeople.....	1.8
Median number of outside salespeople.....	1.0

24. "Do you sell salt?"

Percent of (395 reporting) dealers answering "Yes"..... 69%

(a) "If 'yes,' what type(s)?"

	Percent of Salt-Selling Dealers Reporting
Respondents..	269
Livestock salt - block form.....	95%
Livestock salt - loose form.....	88%
Trace-mineralized salt.....	86%
Salt-based vitamin-mineral mixtures.....	36%
Water conditioning or water softening salt.....	80%
Ice melting salt.....	42%
Other.....	2%

25. "Roughly how many miles radius from this farm supply establishment does your farmer trading area extend?"

	Percent of Dealers Reporting
Respondents..	348
100 or more miles....	8%
50 - 99 miles.....	14%
30 - 49 miles.....	20%
20 - 29 miles.....	28%
1 - 19 miles.....	30%

Average radius per dealer..... 37 miles

Median radius per dealer..... 25 miles

26. "Which of the following publications do you regularly receive?"

	Percent of Dealers Reporting
Respondents..	377
Farm Store Merchandising....	61%
Farm Supplier.....	93%
Feed & Grain Times.....	34%
Feed Management.....	29%
Feedstuffs.....	27%
Tack 'n Togs Merchandising..	14%

Note: If you are with a multiple outlet company, please answer only for the outlet where you spend the largest part of your time.

START HERE

1. Do you sell feed to farmers? (5)—1 ☐ Yes 2 ☐ No

(If no, please skip to question 7)

(a) If "yes," please check the following types of feed you sell.

(6)—1 ☐ Beef cattle feed
2 ☐ Dairy cattle feed
3 ☐ Milk replacer (veal calf supplement)
4 ☐ Swine feed
5 ☐ Layer, breeder, or replacement feed
6 ☐ Broiler feed
7 ☐ Turkey feed

(7)—1 ☐ Sheep feed
2 ☐ Horse feed
3 ☐ Fish feed
4 ☐ Rabbit feed
5 ☐ Dog food
6 ☐ Cat food
7 ☐ Other (please specify) _____

2. In what form(s) do you sell feed? (please check all that apply)

(8)—1 ☐ Complete feed
2 ☐ Feed supplement or concentrate (contains everything except grain and/or roughage)
3 ☐ Base mix or superconcentrate (contains everything except primary protein, grain, and roughage)
4 ☐ Feed premix (uniform mixture of microingredients generally added to feed at rates of up to 100 lbs. per ton of finished feed)
5 ☐ Other (please specify) _____

(a) About how many **tons** of each did you sell in 1986? (ignore categories you do not sell)

	(approx.)	
Complete feed	_____	(9-13)
	tons	
Feed supplement and/or concentrate	_____	(14-18)
	tons	
Base mix and/or superconcentrate	_____	(19-22)
	tons	
Feed premix	_____	(23-26)
	tons	
Other	_____	(27-31)
	tons	

(b) What was the approximate **dollar** volume of your **total** 1986 feed sales?

_____ (approx.)
(32-36) dollars

3. How do you obtain the feed that you sell? (please check)

(37)—1 ☐ Blend supplement/concentrate with grain
2 ☐ Blend base mix with grain and soybean meal
3 ☐ Manufacture feed from a premix
4 ☐ Manufacture feed from the ground up
5 ☐ Buy complete feed and re-sell it as is
6 ☐ Buy premix and re-sell it as is
7 ☐ Buy base mix/superconcentrate and re-sell it as is
8 ☐ Other (please specify) _____

(a) About what percent of your 1986 feed dollar volume came from feed you provided . . .

	approx.	
by blending supplement with grain	_____	(38-40) %
by blending base mix with grain and soybean meal	_____	(41-43) %
by manufacturing feed from a premix	_____	(44-46) %
by manufacturing feed from the ground up	_____	(47-49) %
by buying complete feed and re-selling it as is	_____	(50-52) %
by buying premix and re-selling it as is	_____	(53-55) %
by buying base mix/superconcentrate and re-selling it as is	_____	(56-58) %
in any other way	_____	(59-61) %
		100%

4. Do you stock and sell liquid feed supplements? (62)—1 ☐ Yes 2 ☐ No

(a) If "yes," about how many tons of liquid feed supplements did you sell in 1986?

_____ tons
(63-66)

5. Please check the following feed equipment that you use in your business.

(67)—1 ☐ Hammermill
(69) 2 ☐ Horizontal mixer
3 ☐ Vertical mixer
4 ☐ Pellet mill
5 ☐ Roller mill
6 ☐ Grain storage bins
7 ☐ Bagging equipment

(68)—1 ☐ Bulk feed bins
(70) 2 ☐ Bulk feed truck bodies
3 ☐ Bucket elevator
4 ☐ Screw conveyor (exclude augers on vehicles)
5 ☐ Drag flight conveyor
6 ☐ Other (please specify) _____
7 ☐ None

(a) Please **circle** each of the items in question 5 above that you bought in the last five years.

(b) Do you **stock** and **sell** feed bins and/or tanks? (71)—1 ☐ Yes 2 ☐ No

turn to page 2

6. Please check the following feed manufacturers whose feed you handle.

(72)1☐ ADM
2☐ Agway
3☐ Cenex
4☐ Conagra
5☐ Doboy (Domain Industries)
6☐ Farmland
7☐ FS
8☐ Golden Sun
(73)—1☐ Hubbard Milling
2☐ Kent
3☐ Land O'Lakes
4☐ Manna Pro (Carnation)
5☐ Master Mix (Central Soya)
6☐ Nutrena (Cargill)
7☐ Purina Mills
8☐ Southern States
(74)—1☐ Supersweet (International Multifoods)
2☐ United Feeds
3☐ United Suppliers
4☐ Vigortone
5☐ Walnut Grove
6☐ Wayne Div. of Continental Grain
7☐ Other (please specify)

_____ (80)—1

7. Do you stock and sell silage **preservatives** or **inoculants?**

(5)—1☐ Yes 2☐ No

(a) If "yes," about how much of them did you sell in 1986?

_____ (6-11) dollars

8. Do you stock and sell any **animal health products**—either as feed additives, or as "packaged" health products sold in forms such as injectable, soluble, bolus, tablet etc.?

☐ Yes (12)—1 ☐ No 2

(If "no," please skip to question 23)

(a) If "yes," which of the following do you sell? (please check all that apply)

(13)—1☐ "Packaged" health products for **livestock**
2☐ Feed additive health products for livestock
3☐ "Packaged" health products for **poultry**
4☐ Feed additive health products for poultry

9. Please check the following types of **livestock** health products (other than poultry) that you stock and sell, if any.

	"PACKAGED" Health Products For LIVESTOCK	LIVESTOCK Health Products Sold As FEED ADDITIVES
Antibiotics for:		
Beef cattle	☐ 1—(14)	☐ 1—(16)
Dairy cattle	☐ 2	☐ 2
Swine	☐ 3	☐ 3
Anticoccidial agent	☐ 4	☐ 4
Bloat preventive	☐ 5	☐ 5
Electrolytes	☐ 6	
Grub control product	☐ 7	☐ 6
Iron products	☐ 8	☐ 7
Insecticides/miticides	☐ 9	☐ 8
Insecticide-treated eartags	☐ 0	
Mastitis treatment	☐ X	
Microbial/fermentation product	☐ Y	☐ 9
Milk replacer	☐ 1—(15)	
Nitrofurans	☐ 2	☐ 1—(17)
Ointment or salve	☐ 3	
Scours treatment for:		
Swine	☐ 4	☐ 2
Calves	☐ 5	☐ 3
Sulfa drugs	☐ 6	☐ 4
Vaccines and/or other biologicals for:		
Cattle	☐ 7	
Swine	☐ 8	
Vitamin/mineral premixes		☐ 5
Wormers for:		
Cattle	☐ 9	☐ 6
Swine	☐ 0	☐ 7
Other types (please specify) _____	☐ X	☐ 8

10. Please check the following types of **poultry** health products that you stock and sell, if any.

	"PACKAGED" Health Products For POULTRY	POULTRY Health Products Sold As FEED ADDITIVES
Antibiotics	☐ 1—(18)	☐ 1—(19)
Vaccines/biologicals	☐ 2	
Wormers	☐ 3	☐ 2
Other	☐ 4	☐ 3

11. Please check the following brands of **cattle** wormers that you stock and sell, if any.

(20)—1☐ Baymix
(21) 2☐ Ivomec
3☐ Levasole
4☐ Rumatel
5☐ Safe-Guard
6☐ TBZ
7☐ Tramisol
8☐ Other (please specify)

_____

(a) Please circle the check mark in question 11 above that indicates your **largest** selling (dollar volume) cattle wormer.

12. In what **form(s)** are the cattle wormers that you sell, if any? (please check)

(22)—1☐ Bolus
2☐ Drench/liquid
3☐ Feed additive
4☐ Paste
5☐ Soluble powder
6☐ Other (please specify)

_____

13. Do you stock and sell cattle **implants?** ☐ Yes (23)—1 ☐ No 2

(a) If "yes," which brand(s)? (please check)

(24)—1☐ Compudose
2☐ Ralgro
3☐ Steer-oid
4☐ Synovex
5☐ Other (please specify)

_____

14. Please check the following brands of **hog wormers** that you stock and sell, if any.

(25)—1☐ Atgard-V
(26) 2☐ Banminth
3☐ Hygromix
4☐ Ivomec
5☐ Mecadox
6☐ Levasole
7☐ Pig Wormer-17
8☐ Safe-Guard
9☐ TBZ
0☐ Tramisol
X☐ Wazine
Y☐ Other (please specify)

_____

(a) Please circle the check mark in question 14 above that indicates your **largest** selling (dollar volume) hog wormer.

(b) In what form(s) do you sell hog wormers, if any? (please check)

(27)—1☐ Bolus
2☐ Drench/liquid
3☐ Feed additive
4☐ Paste
5☐ Soluble powder
6☐ Other (please specify)

_____

15. Do you stock and sell any rodenticides? ☐ Yes (28)—1 ☐ No 2

If "yes" . . .

(a) Which rodenticide brand(s)? (please check)

(29)—1☐ Assault
(30) 2☐ D-Con
3☐ Havoc
4☐ Just One Bite
5☐ Ramik
6☐ Rampage
7☐ Ropax
8☐ Vengeance
9☐ Other (please specify)

_____

(b) Please circle the check mark in question 15(a) above that indicates your largest selling (dollar volume) rodenticide.

16. Please check the following companies whose brands of **antibiotics, antibacterials** and/or **growth promotants** you stock and sell for **inclusion** in **FEED.**

	For Beef Cattle 1	For Dairy Cattle 2	For Hogs 3	For Poultry 4	For Horses 5		
Agri-Bio (A. H. Robbins)	☐	☐	☐	☐	☐	(31)	(50)
A. L. Laboratories	☐	☐	☐	☐	☐	(32)	(51)
American Cyanamid	☐	☐	☐	☐	☐	(33)	(52)
Borden	☐	☐	☐	☐	☐	(34)	(53)
Cutter (Mobay)	☐	☐	☐	☐	☐	(35)	(54)
Elanco Products	☐	☐	☐	☐	☐	(36)	(55)
Hess & Clark	☐	☐	☐	☐	☐	(37)	(56)
Hoechst-Roussel	☐	☐	☐	☐	☐	(38)	(57)
I.M.C.	☐	☐	☐	☐	☐	(39)	(58)
MSD Agvet (Merck)	☐	☐	☐	☐	☐	(40)	(59)
Pfizer	☐	☐	☐	☐	☐	(41)	(60)
Rhone-Poulenc	☐	☐	☐	☐	☐	(42)	(61)
Roche Chemical Div. (Hoffmann-La Roche)	☐	☐	☐	☐	☐	(43)	(62)
Salsbury Laboratories (Solvay)	☐	☐	☐	☐	☐	(44)	(63)
SDS Biotech	☐	☐	☐	☐	☐	(45)	(64)
SmithKline	☐	☐	☐	☐	☐	(46)	(65)
TUCO	☐	☐	☐	☐	☐	(47)	(66)
Other (please specify) _____	☐	☐	☐	☐	☐	(48)	(67)
None	☐	☐	☐	☐	☐	(49)	(68)

(a) Please circle the check marks in question 16 above that indicate your **largest** selling (dollar volume) antibiotic for preventive care of each class of animal. (80)—2

17. Please check the following companies whose brands of antibiotics you stock and sell in **injectable, soluble** or **bolus** form.

	For Beef Cattle 1	For Dairy Cattle 2	For Hogs 3	For Poultry 4	For Horses 5		
Affiliated Laboratories	☐	☐	☐	☐	☐	(5)	(29)
Agripharm (Essar)	☐	☐	☐	☐	☐	(6)	(30)
American Cyanamid	☐	☐	☐	☐	☐	(7)	(31)
Anchor Div., (Boehringer Ingelheim)	☐	☐	☐	☐	☐	(8)	(32)
Bristol Ag Products	☐	☐	☐	☐	☐	(9)	(33)
Ceva Laboratories	☐	☐	☐	☐	☐	(10)	(34)
Cutter (Mobay)	☐	☐	☐	☐	☐	(11)	(35)
Elanco Products	☐	☐	☐	☐	☐	(12)	(36)
Farnam	☐	☐	☐	☐	☐	(13)	(37)
Franklin	☐	☐	☐	☐	☐	(14)	(38)
Grand Laboratories	☐	☐	☐	☐	☐	(15)	(39)
Hess & Clark	☐	☐	☐	☐	☐	(16)	(40)
Hoechst-Roussel	☐	☐	☐	☐	☐	(17)	(41)
MSD Agvet (Merck)	☐	☐	☐	☐	☐	(18)	(42)
Pfizer	☐	☐	☐	☐	☐	(19)	(43)
Pitman-Moore	☐	☐	☐	☐	☐	(20)	(44)
Roche Chemical Div. (Hoffmann-La Roche)	☐	☐	☐	☐	☐	(21)	(45)
Salsbury Laboratories (Solvay)	☐	☐	☐	☐	☐	(22)	(46)
SDS Biotech	☐	☐	☐	☐	☐	(23)	(47)
SmithKline	☐	☐	☐	☐	☐	(24)	(48)
Syntex	☐	☐	☐	☐	☐	(25)	(49)
TUCO	☐	☐	☐	☐	☐	(26)	(50)
Other (please specify) _____	☐	☐	☐	☐	☐	(27)	(51)
None	☐	☐	☐	☐	☐	(28)	(52)

(a) Please circle the check marks in question 17 above that indicate your **largest** selling (dollar volume) antibiotic for treatment of each class of animal.

18. Do you file any FD-1800s or FD-1900s with the FDA for mixing drugs into feeds? ☐ Yes (53)—1 ☐ No 2

19. In which of the following **forms** do you stock and sell antibiotics, if any? (please check)

(54)—1☐ **Included** in feed we sell to farmer
2☐ Packaged for **on-farm** adding to feed
3☐ Soluble antibiotic(s) for on-farm adding to **water**
4☐ Other (please specify)

_____

20. Do you stock and sell **horse** health care products? ☐ Yes (55)—1 ☐ No 2

If "yes," . . .

(a) Which horse health care products? (please check)

(56)—1☐ Wormers
2☐ Shampoo
(57) 3☐ Vitamin-mineral conditioner(s)
4☐ Hoof dressing(s)
5☐ Liniment(s)
6☐ Antiseptic ointment(s)
7☐ Fly control products
8☐ Other (please specify)

_____

9☐ None of above

(b) Please circle the check marks in question 20(a) above that indicate your two largest-selling (dollar volume) horse health care items.

(c) If you stock and sell any horse wormers, which brand(s) do you sell? (please check)

(58)—1 ☐ Anthelcide
2 ☐ Anthon
3 ☐ Banminth-P Paste
4 ☐ Benzelmin
5 ☐ Camvet
6 ☐ Dizan
7 ☐ Eqvalan
8 ☐ Equi-Verm
9 ☐ Equizole
0 ☐ Negabot

(59)—1 ☐ Pamoban
2 ☐ Panacur Granules 22.3%
3 ☐ Parvex bolus
4 ☐ Piperazine Adipate
5 ☐ Pip-Pop 320
6 ☐ Purina
7 ☐ Shell
8 ☐ Strongid
9 ☐ Synanthic
0 ☐ Tiox
x ☐ Zimectrin
y ☐ Other (please specify)

_____

21. In roughly what percent of animal health product purchases do your customers ask for your (or one of your salesperson's) opinion or recommendation before making the purchase?

(approx.)

For "packaged" health products _____% (60-62)

For feed additive health products _____% (63-65)

22. What is the peak season for **ordering your** purchases of animal health products? (please check)

	Antibiotics, Growth Promoters	Wormers	Livestock Insecticides, Miticides
	1	2	3
Spring	☐	☐	☐(66)
Summer	☐	☐	☐(67)
Fall	☐	☐	☐(68)
Winter	☐	☐	☐(69)
No seasonal variation	☐	☐	☐(70)
Other (please specify) _____	☐	☐	☐(71)

(a) What season is normally best for your **sales** of animal health products? (please check)

	Antibiotics, Growth Promoters	Wormers	Livestock Insecticides, Miticides
	1	2	3
Spring	☐	☐	☐(72)
Summer	☐	☐	☐(73)
Fall	☐	☐	☐(74)
Winter	☐	☐	☐(75)
No seasonal variation	☐	☐	☐(76)
Other (please specify) _____	☐	☐	☐(77)

23. How many full-time workers including the active proprietor(s) does your establishment have now?

_____ (5-6) number

(a) Do you now have any full-time **outside** salespeople for on-farm selling? ☐ Yes (7)—1 ☐ No 2

(1) If yes, how many? _____ (8-9) number

24. Do you sell salt? ☐ Yes (10)—1 ☐ No 2

(a) If "yes," what type(s)? (please check all that apply)

(11)—1 ☐ Livestock salt—block form
2 ☐ Livestock salt—loose form
3 ☐ Trace-mineralized salt
4 ☐ Salt-based vitamin-mineral mixtures
5 ☐ Water conditioning or water softening salt
6 ☐ Ice melting salt
7 ☐ Other (please specify)

_____

25. Roughly how many miles radius from this farm supply establishment does your farmer trading area extend?

_____ (12-14) miles radius

26. Which of the following publications do you regularly receive? (please check all that apply)

(15)—1 ☐ Farm Store Merchandising
2 ☐ Farm Supplier
3 ☐ Feed & Grain Times
4 ☐ Feed Management
5 ☐ Feedstuffs
6 ☐ Tack 'n Togs Merchandising
7 ☐ None of above

(80)—4

FARM SUPPLIER
Mount Morris, Illinois 61054